Guide for Charter School Education Planning and Results Reporting

Requirements for Alberta charter school authority three-year education plans for 2008/09 – 2010/11 and annual education results reports, November 2008

February 2008

Alberta
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Guide to Charter School Education Planning and Results Reporting, 2008-2011©

Requirements for Alberta charter school authorities.

This document provides the requirements for Charter School:

- Three-year education plans for 2008-2011. These plans cover the 2008/09, 2009/10 and 2010/11 school years and are due on June 20, 2008.
- Annual education results report (AERR) for the 2007/08 school year, based on the three-year education plans for 2007-2010. AERRs are due November 30, 2008.

This document is also available online at
http://www.education.alberta.ca/admin/resources/planning.aspx

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Guide to Charter School Education Planning and Results Reporting, 2008-2011

Requirements for Alberta charter school authorities

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What's changed?

	Page
Some text has been reformatted in bullet form for readability. Key changes and clarifications are highlighted in the text.	
• Charter school three-year education plans for 2008/09 to 2010/11 are due June 20, 2008.	2-2 & 2-7
• Charter school boards are to indicate in their three-year plans and AERRs how they have addressed their obligations under Section 13 of the School Councils Regulations (updated 2007).	2-7 & 3-6
• Clarified that charter school three-year education plans are updated each year by adjusting strategies and targets, rolling the plan forward a year. A completely new three-year plan is not expected each year.	2-1
• Simplified the presentation of measures in the education plan section.	2-4
• Clarified that additional measurement information may be provided in the education plan at the charter school's discretion.	2-5 to 2-6
• As a result of discussions with stakeholders over the last year, the Accountability Pillar post-secondary transition measure has been changed to the six-year rate from the four-year rate. This change will be reflected in the May 2008 Accountability Pillar evaluations.	2-6, 3-4
• A note has been added to the measures table in the Education Plan section indicating that additional information on some measures is required to be reported in the AERR.	2-6
• A note has been added to include the web address of the three-year education plan and the AERR within the document (both print and posted versions) for ease of reference.	2-7 & 3-6
• Clarified that the reference to information on school generated funds is found in Schedules as well as the charter school's Audited Financial Statements.	3-5
• Added an alternate sample plan format to Appendix A that simplifies the presentation of measures information.	Sample 2, pages 12-23

Background

Section 16(2) of the *Government Accountability Act* requires organizations under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year "in the form and at a time acceptable to the Minister." Section 78 of the *School Act* requires school authorities to use accountability information and report it to students, parents and the public in a manner the minister prescribes.

Charter schools have a unique purpose in Alberta's public education system to provide different and innovative approaches for improving student learning, not only for the benefit of their own students, but also for use in other schools.

Charter school plans and reports align with and build on Alberta Education's vision, mission, goals and outcomes for the basic education system. In this way, they help ensure that the entire learning system is focused on key priorities that meet the educational needs of Alberta students. At the same time, charter school plans and reports incorporate local goals, priorities and outcomes that reflect the unique characteristics and circumstances of their communities. In short, they reflect local needs and priorities within the context of a province-wide framework.

Accountability Framework for the K-12 Education System

Accountability in the basic education system involves an ongoing performance management cycle that enables continuous improvement and critical reflection. Key components are measuring progress and using results to inform decision making. For charter schools, the cycle consists of:

- developing/updating plans that include provincial goals and outcomes and incorporate community input
- preparing budgets that allocate resources to achieve goals and improve results

- implementing strategies to improve student learning
- monitoring and adjusting as needed
- measuring, analyzing and reporting results
- using results to identify areas for improvement for the next plan (i.e., evidence-based decision making)
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, Alberta Education staff and the Minister) about charter school plans and results

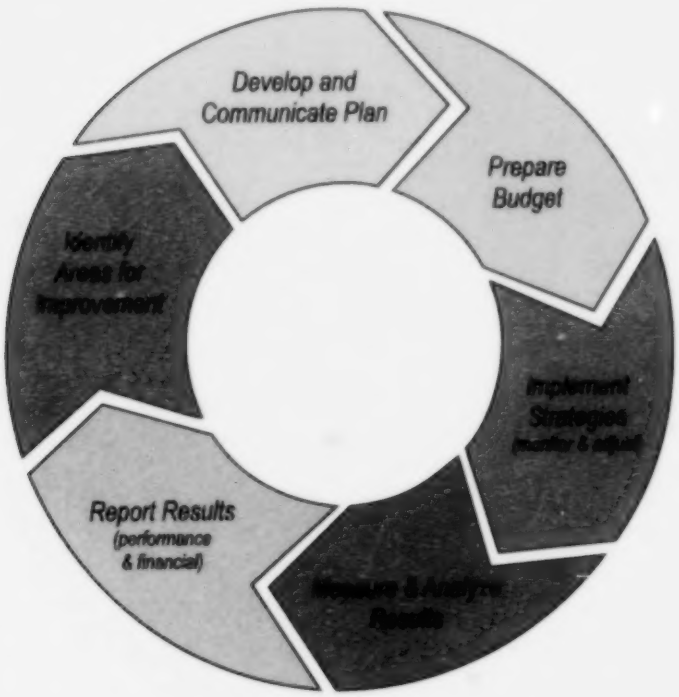
Performance Management Cycle for School Authority Accountability

Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework, which is based on three pillars: Flexibility, Accountability and Funding, and has the following fundamental characteristics:

- implementing strategies to improve student learning
- monitoring and adjusting as needed
- measuring, analyzing and reporting results
- using results to identify areas for improvement for the next plan, i.e., evidence-based decision making
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, Alberta Education staff and the Minister) about charter school plans and results.

Performance Management Cycle for School Authority Accountability



Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework, which is based on three pillars: Flexibility, Accountability and Funding, and has the following fundamental characteristics:

- equitable distribution of funds
- increased flexibility to facilitate local decision making
- public accountability for the use of resources and the results achieved.

The Accountability Pillar places increased emphasis on achieving outcomes, reporting results and using results for informed decision making for the purpose of improving programs and student results in subsequent years. Charter school performance is measured, evaluated and reported by comparing current results against both past performance and provincial standards on a common set of measures for all charter schools, as well as those unique to the charter goals approved by the Minister, using a common evaluation methodology.

Charter schools continue to be accountable for meeting the learning needs of all students and ensuring that provincial legislation, regulations, policies and standards are met.

The Accountability Pillar enhances the use of measurement in performance management of school authorities. It includes:

- a concise set of performance measures that addresses outcomes of importance to parents and the public (see page 2-6 for a complete list of performance measures, organized by goal, outcome and category)
- results of consistent surveys of parents, students and teachers, administered annually by Alberta Education
- standard methodology to evaluate results
- consistent, accessible data reports to school authorities for their use in school planning and reporting.

Accountability Pillar Evaluation Methodology

Each measure within the set of Accountability Pillar measures is evaluated on two bases: achievement and improvement, then given an overall evaluation that combines the achievement and improvement evaluations. Four years of results are used to evaluate a measure.

The **achievement** evaluation compares the current charter school result against fixed standards for each measure, which are set by selecting the 5th, 25th, 75th and 95th percentiles on the distribution of baseline three-year average results for all school jurisdictions. These standards will be held constant for seven to ten years. The comparison of the current result to the standards results in one of the following achievement levels:

- Very high (blue) for results at or above the 95th percentile

- High (green) for results between the 75th and 95th percentiles
- Intermediate (yellow) for results between the 25th and 75th percentiles
- Low (orange) for results between the 5th and 25th percentiles
- Very low (red) for results below the 5th percentile.

Note: The Achievement Evaluation Table in the Measure Evaluation Reference section of the charter school's Accountability Pillar Overall Summary report contains the range of values for each standard for each measure.

The **improvement** evaluation compares the current charter school result with the prior three-year average charter school result for each measure, using a statistical test to determine the extent of change. This results in one of the following improvement levels:

- Improved significantly (blue)
- Improved (green)
- Maintained (yellow)
- Declined (orange)
- Declined significantly (red)

The evaluations of improvement and achievement are combined for the **overall** evaluation for the measure, resulting in one of the following overall evaluations for the measure:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

The table below indicates how the achievement and improvement evaluations are combined to arrive at an overall evaluation for each measure.

Improvement	Achievement				
	Very High	High	Intermediate	Low	Very Low
Improved Significantly	Excellent	Good	Good	Good	Acceptable
Improved	Excellent	Good	Good	Acceptable	Issue
Maintained	Excellent	Good	Acceptable	Issue	Issue
Declined	Good	Acceptable	Issue	Issue	Concern
Declined Significantly	Acceptable	Issue	Issue	Concern	Concern

Similarly, the overall evaluations for each measure within a category are combined to arrive at an evaluation for the category. This results in one of the following category evaluations:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

Example of measure and category evaluations:

Category	Measure	Evaluations			
		Achievement	Improvement	Overall	Category
Student Learning Achievement (Grades 10 – 12)	Diploma: Acceptable	High	Maintained	Good	Acceptable
	Diploma: Excellence	Intermediate	Declined	Issue	
	Diploma Exam Participation Rate (4+ Exams)	Intermediate	Maintained	Acceptable	
	Rutherford Scholarship Eligibility Rate	High	Improved	Good	

Accountability Pillar Results and Evaluations for Charter Schools

Alberta Education collects data, calculates and provides five years of results, prior three-year averages and evaluations for the Accountability Pillar measures and categories to charter school authorities twice a year. The early May results are provided for use in preparing the three-year plan. The update is provided in early October when the new year of achievement test and diploma exam results are available for reporting in the AERR.

A complete set of evaluations for all Accountability Pillar measures and categories was provided for the first time to each charter school in May 2007 when four years of survey results became available. The evaluation of survey measures provides additional information to assist charter schools address results and improve programs for students.

Charter School and Alberta Education Review and Follow-up

The evaluation of the Accountability Pillar measures provides a consistent and transparent framework for interpreting results and helps charter schools identify areas needing improvement.

- High (green) for results between the 75th and 95th percentiles
- Intermediate (yellow) for results between the 25th and 75th percentiles
- Low (orange) for results between the 5th and 25th percentiles
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Charter School and Alberta Education Review and Follow-up

The evaluation of the Accountability Pillar measures provides a consistent and transparent framework for interpreting results and helps charter schools identify areas needing improvement.

The results and evaluations of Accountability Pillar measures provide information on charter school performance and trends over time. Charter schools are responsible for:

- applying their expertise in data and program analysis as well as their knowledge of local conditions (context) to develop an understanding of the results
- determining how best to bring about improvement.

All charter schools are required to address Accountability Pillar results in their three-year plans by including improvement strategies. For any measure with an overall evaluation of "Issue" or "Concern," charter schools are required to

- include and clearly identify (e.g., highlight) strategies in their three-year education plans that will improve results over time, taking into account the factors affecting performance based on data and contextual analysis
- set incremental targets for measures that have an overall evaluation of "Issue" or "Concern" for each year of the plan.

Alberta Education staff continue to meet with charter school staff twice a year – in the fall to review charter school three-year education plans and in the winter to review AERRs. These reviews include:

- looking at Accountability Pillar measure results and evaluations
- discussing the charter school's efforts to maintain good results and to improve results where needed, with priority on measures that drop to or remain at the "Issue" or "Concern" level based on the May Accountability Pillar evaluations.

See Appendix D for information on the development of the Accountability Pillar.

Education Plans for Charter Schools, 2008 - 2011

An Overview of the Process

Preparing/Updating Education Plans

The planning component of the performance management cycle involves:

- updating three-year education plans annually in keeping with provincial direction for the K – 12 education system
- developing the budget to support the plan.

Updated charter school plans maintain a three-year timeframe — as one year is completed, another is added, rolling the plan forward. At the same time:

- strategies and priorities are adjusted based on performance over time, the Accountability Pillar evaluation, and local factors such as changes in charter school priorities and the operating environment (context)
- the budget is developed to implement the first year of the plan and to position the charter school for future years.

This approach to planning allows charter schools to be responsive to student and community needs and to focus on continuous improvement while maintaining continuity from year to year and consistency with provincial direction.

The ultimate authority for a charter school's three-year education plan rests with the charter board. The charter board provides overall direction for the education plan. In consultation with parents, staff and other stakeholders in their community, the charter school administration develops a planning process that meets the charter school's needs and is responsible for preparing the content of the plan for approval by the charter board.

In response to stakeholder input, two **optional** formats are provided in Appendix A that includes all the required elements of the charter school plan. These formats also are posted on the Internet in Word for charter

schools to download and use if they wish. If the charter school chooses to use a format of its own design, the sample formats can be used as a checklist to ensure all requirements are included.

Considerations in Updating Education Plans

Charter schools update their three-year education plans each year, taking the following considerations into account:

- prior years' results and targets in the previous three-year education plan
- input from stakeholders such as school councils, students, parents and the school community
- available resources
- Alberta Education's annual three-year business plan and provincial results
- feedback from Alberta Education.

Although entirely new plans are prepared infrequently, components such as strategies and targets are updated each year, and components such as the vision, mission and beliefs (foundation statements) are revisited and refreshed on an occasional basis. Such reviews are particularly appropriate when a charter board prepares for charter renewal.

Communicating Education Plans

Three-year education plans are public documents. Charter schools are required to post their plans on their websites, including subsequent amendments or updates. They are also required to use a variety of methods to communicate their plans and their achievements to the broader community. Appropriate tools may include newspaper inserts, brochures, and community meetings.

Education Plan Due Date

Three-year education plans for charter schools are **due by May 31** of each year **(extended to June 20, 2008 for the 2008-11 plan)**. Charter schools post their updated three-year plans on their websites by the due date and notify Alberta Education by sending an e-mail to the Zone Director. The e-mail message should advise that the plan has been posted to the charter school's website and provide the web link to the plan. If plans are revised after submission, charter schools advise the Zone Director by e-mail of the changes and that the revised plan has been posted.

Reviewing Education Plans

Alberta Education staff review charter school three-year education plans to:

- enhance the department's understanding of the charter school's context
- encourage charter school improvement efforts
- monitor compliance with provincial requirements
- identify implications for provincial planning.

Components and Requirements of Education Plans, 2008-2011

[Components are required unless identified as optional. Components are defined in Appendix C, pages 21-25. **Two optional formats** are provided in Appendix A and posted as a Word document on the Ministry's website that charter schools can use in preparing their three-year plans.]

Education plans for 2008/09 – 2010/11 include the following components:

- A **message** from the board chair (optional).
- An **accountability statement**, worded as follows:
  The Education Plan for (charter school) the three years commencing September 1, (year) was prepared under the direction of the Charter Board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. This Education Plan was developed in the context of the provincial government's business and fiscal plans. The Charter Board is committed to achieving the results laid out in this plan.
- Information on how the plan was or will be communicated to parents and the public. Also include a link to the plan posted on the charter school's website.
- **Foundation statements** (i.e., vision and mission – required and using the same wording approved by the Minister; principles and beliefs – optional) that articulate the charter school's values and purpose. These are consistent with the corresponding statements in Alberta Education's business plan.
  - **vision:** describes a possible and desired future state that the charter school strives to achieve; it focuses on student achievement and programs or services that maximize student learning

- **mission**: provides a clear, concise description of the charter school's purpose and role
- **principles and beliefs**: provide statements of the principles and beliefs that guide the charter school's decision-making.

- A **profile of the charter school** (optional). Profiles include information about the charter school, such as:
  - characteristics of the community and students
  - education programs
  - sites (size, location and other details)
  - planning environment, including emerging trends and issues that affect operations.

- **Charter goal(s) consistent with the charter approved by the Minister, related outcomes, performance measures and targets, as follows:**
  - at least one outcome and performance measure for each charter goal
  - targets for each year of the plan for charter goal measures for which there are more than one year of results, as follows:
    - a target for the first year of the plan when there are two years of results
    - targets for two years when there are three years of results
    - targets for all three years of the plan when there are four or more years of results.

- **Provincial goals, related outcomes, performance measures and targets, as follows:**
  - the one-page evaluation of charter school results from the May 2008 Accountability Pillar Overall Summary report provided by Alberta Education, which contains the evaluation for each measure and category
  - required goals, outcomes and performance measures (see list on page 2-6), as applicable. For example, charter schools that have only elementary programs would not include diploma examination results.

  For each required provincial outcome, include:
  - **the measures used to assess progress and achievement of the outcome (see list on page 2-6)**
  - **reference to the results and evaluation for the measures on the summary sheet**

- targets for each year of the plan for measures with an overall evaluation of "Issue" or "Concern".

  These targets must reflect reasonable progress toward or moving into the next higher achievement standard, as defined by the evaluation methodology, over the plan period. For example, if the jurisdiction result is more than 10 percentage points below the next higher achievement standard, it may not be possible to move into that higher standard in three years, but it would be possible to achieve results that are closer to the next standard. Refer to the Overall Summary report on the Extranet for the range of results that are included in each achievement of standard.

  Notes:

  - As gains are made toward or into the next achievement standard, the improvement evaluation will reflect the progress with an evaluation of "Maintained" or higher.
  - While useful, especially for Accountability Pillar measures, targets are not required except for Accountability Pillar measures with an overall evaluation of "Issue" or "Concern".

Charter schools are encouraged to include additional results or contextual information to help explain strategies and targets to parents and the public, such as:

- **achievement tests or diploma exam results for specific grades and subjects**
- **five-year high school completion rates**
- **Accountability Pillar survey results for a particular respondent group**

Local strategies (at least one strategy for each outcome in the plan), that:

- address learning needs and achievement of outcomes for all students
- **are designed to improve results on performance measures selected for charter goals**
- are designed to improve charter school selected Accountability Pillar results. **Charter schools with an overall evaluation of "Issue" or "Concern" based on the evaluation of Accountability Pillar results are required to clearly identify (e.g., highlight) their strategies for improving results for those measures.**

Required Goals, Outcomes and Performance Measures

Listed below are the required goals, outcomes and performance measures for charter school three-year education plans for 2008/09 to 2010/11. Targets for each year of the plan are required for Accountability Pillar measures with an overall evaluation of "Issue" or "Concern." Measures that are not part of the Accountability Pillar are shaded. Survey measures typically consist of a number of questions for each respondent group.

Categories	Charter Goals, Outcomes and Performance Measures (Section 35 of the *School Act* reflecting the charter school's purpose/mandate) • Locally determined.
Safe and Caring Schools	**Goal One: High Quality Learning Opportunities for All** **Outcome: Schools provide a safe and caring environment for students.** • Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others and are treated fairly at school.
Student Learning Opportunities	**Outcome: The education system meets the needs of all K-12 students, society and the economy.** • Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. • Overall teacher, parent and student satisfaction with the overall quality of basic education. • Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community. **Outcome: Children and youth at risk have their needs addressed through effective programs and supports.** • Annual dropout rate of students aged 14 to 18 *(high school programs)*. **Outcome: Students complete programs.** • High school completion rate of students within three years of entering Grade 10. *(high school programs)*.
Student Learning Achievement, K-9	**Goal Two: Excellence in Student Learning Outcomes** **Outcome: Students demonstrate high standards in learner outcomes.** • Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard, and the percentage who achieved the standard of excellence on Provincial Achievement Tests (overall cohort results).
Student Learning Achievement, 10-12	• Overall percentage of students who achieved the acceptable standard, and overall percentage of students who achieved the standard of excellence on diploma examinations *(high school programs)*. • Percentage of students writing four or more diploma exams within three years of entering Grade 10. • Percentage of Grade 12 students eligible for a Rutherford Scholarship *(high school programs)*.
Preparation for Life Long Learning, Employment, and Citizenship	**Outcome: Students are well prepared for lifelong learning.** • High school to post-secondary transition rate of students within **six** years of entering Grade 10 *(high school programs)*. • Overall teacher and parent satisfaction that high school graduates demonstrate the knowledge and skills for lifelong learning *(required for K-9 charter schools and optional for high school programs)*. **Outcome: Students are well prepared for employment.** • Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school. **Outcome: Students model the characteristics of active citizenship.** • Overall teacher, parent and student agreement that students model the characteristics of active citizenship.
Involvement	**Goal Three: Highly Responsive and Responsible Jurisdiction** **Outcome: The charter school demonstrates effective working relationships with partners and stakeholders.** • Overall teacher and parent satisfaction with parental involvement in decisions about their child's education.
Continuous Improvement	**Outcome: The jurisdiction demonstrates leadership and continuous improvement.** • Overall percentage of teachers, parents **and students** indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years. *(clarified wording)* • Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.

Notes:
- The results for these measures are available in the Accountability Pillar reports on Alberta Education's Extranet.
- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- **In the AERR, charter schools are required to report additional results for high school completion (four- and five-year rates), provincial achievement tests (each subject and grade), diploma examinations (each subject) and post-secondary transition (four-year rates). See pages 3-4 and 3-5.**
- See Appendix B for a brief definition of each performance measure.

- **Budget Highlights.** This section presents highlights from the charter board's budget for the first year of the three-year plan in a way that is easily understood, transparent and meaningful to the public. Budget highlights must provide key financial information about the upcoming school year, focusing on anticipated changes or shifts in focus to address the Accountability Pillar results. This section may refer to budgeted changes in enrolment, certificated and un-certificated staff, programs, funding, revenues and expenses, annual surpluses or deficits and accumulated surpluses. This section must include:
  - guiding principles the charter board uses in financial planning
  - charts/tables that summarize information from the charter board's budget
  - a web link to the charter school's Budget Report Form.
- **Highlights of facility and capital plans.** Include:
  - a brief description of major school renewal or leasing projects underway or planned over the next three years (if applicable) and their benefit to students *(which students, programs)*
  - a web link to more detailed information on the charter school's facility and capital plans.
- **Publication and Communication.** Charter schools must post their updated education plans on their websites by May 31st **(extended to June 20, 2008 for the 2008 – 2011 plan)**, and include the following additional information:
  - indicate how the plan was or will be communicated to parents and the public
  - **indicate what the board has done to meet its obligations under Section 13 of the School Councils Regulation (Alberta Regulation 113/2007) to provide opportunity for the school council to be involved in updating the charter school three-year education plans**
  - **indicate how the school council was involved in updating the plan**
  - **include the web link to the charter school three-year education plan in both the print and posted versions of the document.**

- Charter schools have an obligation to share their effective practices and innovative approaches for the benefit of Alberta's education system as a whole. To support this, charter school education plans must include a Communication Plan that outlines how the school will carry out this obligation.

  The elements of a good communication plan include:

  - objectives
  - audiences
  - key messages
  - an action plan (specific communication strategies) with timelines.

Note: **Two** optional formats are provided in Appendix A that includes all the required elements of the charter school's plan.

Results Report

An Overview of the Process

Preparing Results Reports

Each year, charter schools measure and interpret their performance and report on their progress toward achieving the charter and provincial goals and outcomes of their three-year education plans in their Annual Education Results Report (AERR). This includes measuring and reporting on local measures as well as reporting and responding to measurement information and evaluations received from Alberta Education. The Accountability Pillar performance measure results and evaluations are used along with other charter school results and contextual information to determine where improvements are needed.

The AERR is prepared under the direction of the charter school board, using a process determined by the charter school staff. The report is approved by the board and informs stakeholders where the charter school is in relation to where it wants to be in achieving its goals and outcomes. It demonstrates that the charter board is accountable for results and for the wise use of resources to provide quality programs for students and to address areas for improvement. AERRs provide charter schools with the opportunity to summarize their accomplishments, in addition to reporting on performance.

In preparing their results reports, charter schools compile and assess their results and evaluations that pertain to the performance measures identified in their three-year education plans, taking into account provincial results, trends and context (see Alberta Education's 2007/08 Annual Report published September 2008 for provincial context), as well as local, context. Charter school results come from:

- Alberta Education, which provides results for provincially required measures on the Extranet for the required measures, as follows:
  - Accountability Pillar surveys of students, parents and teachers

- results from provincial achievement tests and diploma examinations
- high school completion rates, dropout rates, diploma examination participation rates, high school to post-secondary transition rates and Rutherford Scholarship eligibility rates.

- Local sources including charter school surveys[1] used to collect information for the charter goal and optional local performance measures.

Reporting-Related Communications

Annual education results reports (AERRs) are public documents. Charter schools are required to post these reports on their websites and to include the web link in the AERR (print and posted versions).

Charter schools are also encouraged to use tools such as newspaper inserts, brochures, and community meetings to make the information more broadly accessible tp parents and the public. Information that is summarized for public distribution must include results for all performance measures reported in the charter school's AERR.

A charter school's AERR must identify:

- how the report was or will be communicated to the public.
- how charter school results and interpretation of Accountability Pillar measures are communicated to the school council.

Results Report Due Date

Charter schools post their AERR by the **due by November 30** and notify Alberta Education by sending an e-mail to the respective Zone Director:

- advising that the report has been posted to the charter school's website
- providing the web link to the report. If the report is revised following the initial notification, inform your Zone Director of the changes and re-posting.

[1] To support school authorities in their local efforts to survey stakeholders, Alberta Education prepared a useful handbook, *How to Conduct Satisfaction Surveys. A Practical Guide to Conducting Surveys within Alberta's Education System*. The handbook can be downloaded from the department's Website: <http://education.alberta.ca/media/443322/SatisfactionSurveyGuide_2005.pdf>

Reviewing Annual Education Results Reports

Alberta Education staff review charter schools' AERRs to:

- enhance the department's understanding of charter school results
- determine whether the implications of results for the next update of the charter school plan have been considered, e.g. how shortfalls in performance will be addressed
- monitor compliance with provincial requirements
- ensure consistency with the related education plan
- encourage charter school results reporting and improvement efforts
- identify implications for the department's planning.

Components and Requirements for the November 2008 AERR

The November 2008 Annual Education Results Report includes the components listed below (revisions since the April 2007 Guide are highlighted). A template for the AERR is under development and will be provided to charter schools when available.

- A **message** from the board chair (optional).
- An **accountability statement**, worded as follows:

  The annual education results report for **(name of charter school)** for the **(year)** school year was prepared under the direction of the Charter Board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. The Charter Board is committed to using the results in this report, to the best of our abilities, to improve the outcomes for our students. We will use the results to develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.

- Information on how the report was or will be communicated to parents and the public.
- The Accountability Pillar Overall Summary report provided by Alberta Education in October 2008.

- Highlights for the previous year, including:
  - the charter school's **accomplishments** (impact of major activities/strategies), including achievement of specific groups of students.
    - web links to the charter school's AISI project(s) annual report(s) and class size report
    - results of Communication Plan implementation
    - summary of commendations, considerations and required changed identified through the charter school evaluation process, if applicable.
- Report the charter school's **performance measure results** from the charter school's education plans for 2007/08 – 2009/10 in relation to the charter and provincial goals, outcomes and targets for 2007/08 in the three-year plan (see page 2-6 for list of required measures), as applicable. For example, charter schools that have only elementary programs would not report diploma examination results. Specifically, for each required measure, report:
  - five years of charter school and provincial results (or available results if less than five years),
  - most recent result in relation to the target for that year (if applicable)
  - comment on results, such as contextual information, factors affecting performance and analysis of results; if results on Accountability Pillar measures have an improvement evaluation of "Improved" or "Improved significantly", identify the strategies or action taken by the charter school that may have contributed to this improvement.

In addition, report five years of jurisdiction and provincial results for:

- **acceptable and excellence overall results and results for each grade and subject on provincial achievement tests and diploma examinations**
- **four and five-year rates for high school completion rates**
- **four-year rates for post-secondary transition rates.**

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- For Accountability Pillar survey measures, results from the Accountability Pillar Survey, rather than the charter school's own surveys, must be reported. Charter school survey results may be used to report on local measures.

- Identify **future challenges**, including areas for improvement and how the charter school will address these.

- **Summary of Financial Results**

  - provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus and capital reserves

  - include program expenditure information in a table or graph format for the primary audience – parents and other members of the community

  - indicate where more information on the charter school's sources of school generated funds and their uses can be obtained (e.g. web link to the Audited Financial Statements **and related schedules**, contact at central office) and that comparative information is available in a provincial report – provide the web link to the provincial roll up of charter school AFS information: http://education.alberta.ca/admin/funding/audited.aspx

  - provide a web link to the charter school's Audited Financial Statements for 2007-2008.

- **Capital and Facilities Projects**

  - highlight, for parents and the public, progress on major school facilities projects, i.e., building renewal and leasing for the previous school year, as applicable, focusing on benefits to students, e.g., improved accommodation of students, enhanced learning opportunities *[which students, programs]*.

- **Publication and Communication:** Charter schools must post their AERR for 2007/08 on their website by November 30, 2008 and notify the Zone Director. The AERR also must include the following information:

  - how the AERR is communicated to parents and the public

- how the charter board met its obligations under Section 13 of the School Councils Regulation (updated 2007) to provide the school council the opportunity to be involved in the AERR and to share charter school results and interpretation of Accountability Pillar measures with the school council
- how the school council was involved in the school's annual results report
- the web link to the charter school AERR in both the print and posted versions.

Notes:
An online AERR is under development. In the meantime, charter schools have the following options:

- use the Accountability Pillar reports provided by Alberta Education as an appendix to their AERR and provide the additional required information, i.e., targets and commentary on results, in the main part of the AERR using a format of their choosing, or
- copy and paste from the Accountability Pillar report into their own document (provided in Excel to facilitate this option), or
- use the AERR format that is being prepared and will be posted on the planning resources web page when available: http://education.alberta.ca/admin/resources/planning.aspx Charter schools will be notified of the posting.

Sample Format for Charter School Plans

The list below and format that starts on the next page contains the requirements for charter school education plans for 2008/09 – 2010/11. Charter schools may wish to use this information, as well as the list of required measures from page 2-6, as a checklist to ensure their plan contains all the required components, even if a format of their own design is used. All elements are required, unless otherwise identified.

Sample 1

Message from Board Chair (optional)

Accountability Statement

The **(charter school's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities under the *School Act* and the *Government Accountability Act*. This education plan was developed in the context of the provincial government's business and fiscal plans and Alberta Education's business plan. The board is committed to achieving the results laid out in this education plan.

Foundation Statements (optional)

- ☐ *Vision*
- ☐ *Mission*
- ☐ *Principles*

Charter School Profile (optional)

May 2008 Accountability Pillar Overall Summary

Charter Goal(s)
Outcome:

Performance Measures (if Accountability Pillar measure(s), also include the evaluation and previous 3-year average result)	**Current Result**	**Target 2008/09**	**Target 2009/10**	**Target 2010/11**
Strategies (see note)				

Goal One: High Quality Learning Opportunities for All
Outcome: Schools provide a safe and caring environment for students.

Performance Measures	**Current Result**	**Previous 3-yr Avg.**	**May 2008 Evaluation**			**Targets** (see note)		
			Achievement	**Improvement**	**Overall**	**2008/ 2009**	**2009/ 2010**	**2010/ 2011**
• Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school.								
Strategies (see note)								

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: The education system meets the needs of all K-12 students, society and the economy.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.								
• Overall teacher, parent and student satisfaction with the overall quality of basic education.								
• Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community.			n/a	n/a	n/a			
Strategies (see note)								

Note: Shaded measures are required but are not part of the Accountability Pillar.

Outcome: Children and youth at risk have their needs addressed through effective programs and supports.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Annual dropout rate of students aged 14 to 18.								
Strategies (see note)								

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students complete programs.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• High school completion rate of students within three years of entering Grade 10 (high school programs).								
Strategies (see note)								

Goal Two: Excellence in Student Learning Outcomes
Outcome: Students demonstrate high standards in learner outcomes.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.* (K – 9 programs)								
• Overall percentage of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests. (K – 9 programs)								
• Overall percentage of students who achieved the acceptable standard on diploma examinations.* (high school programs)								
• Overall percentage of students who achieved the standard of excellence on diploma examinations. (high school programs)								
• Percentage of students who have written four or more diploma exams within three years of entering high school. (high school programs)								
• Percentage of Grade 12 students eligible for a Rutherford Scholarship. (high school programs)								
Strategies (see note)								

*The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students are well prepared for lifelong learning.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• High school to post-secondary transition rate of students within six years of entering Grade 10. (for high school programs)								
• Overall teacher and parent satisfaction that high school graduates demonstrate the knowledge and skills for lifelong learning (for K – 9 programs).			n/a	n/a	n/a			
Strategies (see note)								

Outcome: Students are well prepared for employment.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school.								
Strategies (see note)								

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students model the characteristics of active citizenship.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall teacher, parent and student agreement that students model the characteristics of active citizenship.								
Strategies (see note)								

Goal Three: Highly Responsive and Responsible Jurisdiction
Outcome: The jurisdiction demonstrates effective working relationships.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall teacher and parent satisfaction with parental involvement in decisions about their child's education.								
Strategies (see note)								

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: The jurisdiction demonstrates leadership and continuous improvement.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets (see note)		
			Achievement	Improvement	Overall	2008/ 2009	2009/ 2010	2010/ 2011
• Overall percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same in the last three years.								
• Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.			n/a	n/a	n/a			
Strategies (see note)								

Note: Shaded measures are required but are not part of the Accountability Pillar.

Budget Highlights

- ☐ *Key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus from the prior year to address evaluation of Accountability Pillar results*
- ☐ *Guiding principles used in financial planning*
- ☐ *Charts/tables to summarize information*
- ☐ *A web-link to the jurisdiction's Budget Report Form*

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Highlights of Facility and Capital Plans

- ☐ *Brief description of major school renewal or construction projects and benefits for students*
- ☐ *A web-link to more detailed information*

Publication and Communication

- ☐ *Include web link to posted document*
- ☐ *Indicate how the three-year plan has been will be communicated to parents and the public*
- ☐ *Indicate how the charter board provided an opportunity for the school council to be involved in updating the three-year education plans*
- ☐ *Indicate how the school council was involved in the three-year education plan*

The list below and format that starts on the next page contains the requirements for charter school education plans for 2008/09 – 2010/11. Charter schools may wish to use this information, as well as the list of required measures from page 2-6, as a checklist to ensure their plan contains all the required components, even if a format of their own design is used. All elements are required, unless otherwise identified.

Sample 2

Message from Board Chair (optional)

Accountability Statement

The **(charter school's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities under the *School Act* and the *Government Accountability Act*. This education plan was developed in the context of the provincial government's business and fiscal plans and Alberta Education's business plan. The board is committed to achieving the results laid out in this education plan.

Foundation Statements (optional)

- ☐ *Vision*
- ☐ *Mission*
- ☐ *Principles*

Charter School Profile (optional)

May 2008 Accountability Pillar Overall Summary

Charter Goal(s)
Outcome:

Performance Measures (if Accountability Pillar measure(s), also include reference to the measure in the Accountability Pillar summary)	**Current Result**	**Target 2008/09**	**Target 2009/10**	**Target 2010/11**
Strategies (see note)				

Goal One: High Quality Learning Opportunities for All
Outcome: Schools provide a safe and caring environment for students.

Targets			**Strategies**
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall teacher, parent and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school. See Safe and Caring Schools, page —.			

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: The education system meets the needs of all K-12 students, society and the economy.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall teacher, parent and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. See Program of Studies, page —.			
Overall teacher, parent and student satisfaction with the overall quality of basic education.			
Overall teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community. See Satisfaction with Program Access, page —.			

Note: Shaded measures are required but are not part of the Accountability Pillar.

Outcome: Children and youth at risk have their needs addressed through effective programs and supports.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Annual dropout rate of students aged 14 to 18. See Dropout Rate, page —.			

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students complete programs.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) High school completion rate of students within three years of entering Grade 10. See High School Completion, page —. (high school programs)			

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Goal Two: Excellence in Student Learning Outcomes

Outcome: Students demonstrate high standards.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.* See PAT Acceptable, page —. (K – 9 programs)			
Overall percentage of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests. See PAT Excellence, page —. (K – 9 programs)			
Overall percentage of students who achieved the acceptable standard on diploma examinations.* See Diploma Acceptable, page —. (high school programs)			
Overall percentage of students who achieved the standard of excellence on diploma examinations. See Diploma Excellence, page —. (high school programs)			
Percentage of students who have written four or more diploma exams within three years of entering high school. See Diploma Exam Participation Rate, page —. (high school programs)			
Percentage of Grade 12 students who meet the Rutherford Scholarship eligibility criteria. See Rutherford Scholarship Eligibility Rate, page —. (high school programs)			

*The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students are well prepared for lifelong learning.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) High school to post-secondary transition rate of students within four years of entering Grade 10. See Transition Rate, page —. (high school programs)			
Overall teacher and parent satisfaction that high school graduates demonstrate the knowledge and skills for life long learning (for K – 9 programs).			

Outcome: Students are well prepared for employment.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school. See Work Preparation, page —.			

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: Students model the characteristics of active citizenship.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall teacher, parent and student agreement that students model the characteristics of active citizenship. See Citizenship, page —.			

Goal Three: Highly Responsive and Responsible Jurisdiction

Outcome: The jurisdiction demonstrates effective working relationships with partners and stakeholders.

Targets			Strategies
2008/09	**2009/10**	**2010/11**	
Performance Measure(s) Overall teacher and parent satisfaction with parental involvement in decisions about their child's education. See Parental Involvement, page —.			

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

Outcome: The jurisdiction demonstrates leadership and continuous improvement.

Targets			Strategies
2008/09	2009/10	2010/11	
Performance Measure(s) Overall percentage of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same in the last three years. See School Improvement, page —.			
Percentage of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth. See Inservice Jurisdiction Needs, page —.			

Note: Shaded measures are required but are not part of the Accountability Pillar.

Budget Highlights

- ☐ *Key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus from the prior year to address evaluation of Accountability Pillar results.*
- ☐ *Guiding principles used in financial planning.*
- ☐ *Charts/tables to summarize information.*
- ☐ *A web link to the jurisdiction's Budget Report Form.*

Please Note

TARGETS

- Annual targets for Accountability Pillar measures with an overall evaluation in May 2008 of "Issue" or "Concern" are required and must indicate progress toward or moving into the next higher achievement standard over the plan period.

STRATEGIES

- Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern."
- Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.

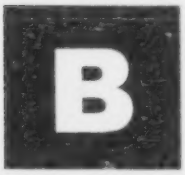
Highlights of Facility and Capital Plans

- ☐ *Brief description of major school renewal or construction projects and benefits for students*
- ☐ *A web link to more detailed information*

Publication and Communication

- ☐ *Include web link to posted document*
- ☐ *Indicate how the three-year plan has been/will be communicated to parents and the public*
- ☐ *Indicate how the charter board provided an opportunity for the school council to be involved in updating the three-year plan*
- ☐ *Indicate how the school council was involved in the three-year education plan*

Appendix



Definitions for Required Performance Measures

Outcomes	*Definitions for Required Performance Measures*
Schools provide a safe and caring environment for students.	**Safe and Caring:** Percentages of teachers, parents and students who agree that students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school. **Definition:** Teachers, parents and students are asked whether: – students feel safe at school, – students feel safe on the way to and from school, – students treat each other well at school, – teachers care about their students, and – students are treated fairly by adults at school.
The education system meets the needs of all K-12 students, society and the economy.	**Program of Studies:** Percentages of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. **Definition:** Teachers, parents and students are asked about: – the variety of courses available to students/you at school, – opportunities students/you have at school to: • learn about music • learn about drama • learn about art • learn about computers • learn about health • learn another language • participate in physical education. **Education Quality:** Percentages of teachers, parents and students satisfied with the overall quality of basic education. **Definition:** Teachers, parents and students are asked about the following: – overall quality of education in your/your child's school – the quality of teaching in your/your child's school – what is being learned in the core subjects is useful (students), students are learning what they need to know (parents and teachers) – school work is interesting – school work is challenging – learning expectations at school are clear. **Satisfaction with Program Access:** Percentages of teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community. **Definition:** Teachers, parents and students are asked about the following services for student in schools: – academic counselling, – career counselling,

Outcomes	*Definitions for Required Performance Measures*
	– library services, and – supports for students with special needs.
Children at Risk have their needs addressed through effective programs and supports	**Drop Out Rate:** Annual dropout rate of students aged 14 to 18. **Definition:** Alberta students aged 14-18 are tracked for one year to determine how many have left the education system without completing. Students are considered to have dropped out if they are not enrolled in the following year or have not met the high school completion criteria, i.e., have not, within the tracking period: received a high school diploma, IOP Certificate, high school equivalency (GED), earned credit in five Grade 12 courses (including four diploma exam courses), or enrolled in a K-12 school in Alberta, an Alberta post-secondary institution or registered in an Alberta apprenticeship program. **Children at Risk:** Percentage of teachers, parents and students who agree that programs for children at risk are easy to access and timely. **Definition:** Teachers, parents and students are asked whether: – teachers at your/your child's school are available to help – students at your school/your child/you can easily get help with school work – students at your school/your child/you can get help with problems not related to school work.
Students complete programs	**High School Completion Rate (3 yr):** Percentages of students who completed high school within three years of entering Grade 10. **Definition:** Alberta Grade 10 students are tracked for three years to determine if they have completed high school. Student are considered to have completed high school if they have, within the tracking period, – received an Alberta high school diploma, an IOP Certificate, high school equivalency (GED), – entered a post-secondary level program at an Alberta post-secondary institution – registered in an Alberta apprenticeship program, or – earned credit in five Grade 12 level courses, including four diploma examination courses. NOTE: Four- and five-year rates also are calculated and provided to school jurisdictions in May for use in planning. These additional results are required to be reported in the AERR.
Students Demonstrate High Standards	**PAT: Acceptable:** Percentages of students who achieve the acceptable standard on Grades 3, 6 and 9 Provincial Achievement Tests. **PAT: Excellence:** Percentages of students who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests. **Definition:** A student achieving the acceptable standard shows an adequate understanding of the core knowledge and adequate basic skills essential core academic subjects: language arts, mathematics (for Grades 3, 6 and 9) and science and social studies (for Grades 6 and 9). A student achieving the standard of excellence consistently shows a deeper understanding of the concepts of the course demonstrating an ability to integrate information and evaluate it from various points of view. Results are calculated as the percentage of all students in each grade (total enrollment in the grade plus the ungraded students who are in the corresponding year of schooling) who have met the acceptable standard and the percentage who have met the standard of excellence. The overall result is the weighted average of the result for each test. **Diploma: Acceptable:** Percentages of students who achieve the acceptable standard on diploma examinations. **Diploma: Excellence:** Percentages of students who achieve the standard of excellence on diploma examinations. **Definition:** Diploma examination results are based on the numbers of students writing each exam who achieve the standards. Achieving the acceptable standard (i.e., a mark of 50%) indicates that the student has met the basic requirements of the course. Achieving the standard of excellence (i.e., a mark of 80%) indicates that the student has performed significantly beyond the minimum requirements of the course. The overall diploma exam result is the weighted average of the result for each exam. **Diploma Exam Participation Rate (4+ Exams):** Percentages of students who have written four or more diploma exams by the end of their third year in high school. **Definition:** The diploma exam participation rate is calculated by tracking Grade 10 students for three school years to determine the percentage of students who have written four or more diploma exams within the tracking period. **Rutherford Scholarship Eligibility Rate:** Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria. **Definition:** Rutherford Scholarship eligibility is calculated by determining the percentage of Alberta Grade 12 students who have marks of 80% or higher in any of the eligible Grades 10, 11 or 12 courses.

Outcomes	*Definitions for Required Performance Measures*
Students are well prepared for lifelong learning	**Transition Rate (6 yr):** Percentages of students who have enrolled in a post-secondary program within six years of entering Grade 10. **Definition:** The high school to post-secondary transition rate is calculated by tracking Alberta Grade 10 students for six years to determine if they have entered a post-secondary-level program at an Alberta post-secondary institution or registered in an Alberta apprenticeship program within the tracking period. An estimate of out-of-province post-secondary enrollment is applied based on the numbers of funded Alberta students attending post-secondary institutions out of province. NOTE: Four-year rates also are calculated and provided to school jurisdictions in May for use in planning. These additional results are required to be reported in the AERR. **Preparation for Lifelong Learning:** Percentages of teachers and parents satisfied that high school graduates demonstrate the knowledge, skills and attitudes necessary for lifelong learning. **Definition:** Teachers and parents are asked whether: – high school students demonstrate the knowledge, skills and attitudes necessary for learning throughout their lifetimes – students at your school/your child are taught the knowledge, skills and attitudes necessary for learning throughout their lifetimes.
Students are well prepared for employment	**Work Preparation:** Percentages of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school. **Definition:** Teachers and parents are asked to indicate whether students in your school/your child are taught attitudes and behaviours that will enable them be successful at work they leave school.
Students model the characteristics of active citizenship	**Citizenship:** Percentages of teachers, parents and students who are satisfied that students model the characteristics of active citizenship. **Definition:** Teachers, parents and students are asked whether students at your school/your child's school: – help each other – respect each other – are encouraged at school to be involved in activities that help the community (not asked in the Grade 4 survey) – are encouraged to try their best – follow the rules.
The jurisdiction demonstrates effective working relationships with partners and stakeholders	**Parental Involvement:** Percentages of teachers and parents satisfied with parental involvement in decisions about their child's education. **Definition:** Teachers and parents are asked: – about the opportunity for parental involvement in decisions about their child's education – about the opportunity for parental involvement in decisions at their child' school – whether parental input into decisions at their child's school is considered – whether parents are involved "A Lot" or "Some" with decisions about their child's education
The jurisdiction demonstrates leadership and continuous Improvement	**School Improvement:** Percentages of teachers, parents and students indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years. **Definition:** Teachers and parents are asked whether the quality of education at your school/your child has received has improved, stayed the same or declined in the past three years. Students are asked: – are you proud of your school – would you recommend your school to a friend (not asked in the Grade 4 survey). **Inservice Jurisdiction Needs**: Percentages of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.. **Definition:** Teachers are asked whether the professional development opportunities made available through the jurisdiction have: – been focused on the priorities of the jurisdiction – effectively addressed your professional development needs – significantly contributed to your on-going professional development.

Notes:

1. For survey measures:
   - All teachers in K-12 schools and all students in Grades 4 and above as well as their parents are included in the surveys.
   - The surveys of students and teachers are administered online, and the parent survey is mailed to the student's address on file.
   - The percentage for each respondent group is calculated by averaging the responses to all the questions that comprise the measure. The overall percentage is calculated by averaging the results for each respondent group.
   - A four-point scale is used for satisfaction and agreement questions, and don't know responses are recorded.
2. For measures that track students for one or more years, an attrition estimate, i.e., the number of students in the same age group who have left the province or are deceased, is factored into the calculation.
3. For measures based on the Grade 10 cohort, students are attributed to the school authority where they earned the most credits.

Setting Targets for Performance Measures

Targets are relevant for performance measures at all levels of Alberta's learning system, including charter school and provincial levels of performance. The information provided below relates specifically to charter school target setting.

Definition

A target is a desired level of performance to be attained by a specified time. Targets are a commitment to improvement.

Purpose

Targets support continuous improvement and are used to assess and report achievement in relation to the desired level of performance. Targets indicate the extent of improvement the organization is striving to achieve by a point in time (e.g., by a certain year), and provide a focus for efforts to achieve improvement, including resource allocation, staffing and strategy development and implementation.

Targets are required for the required measures in charter school plans, as data becomes available. Charter schools assess their performance on the required measures against targets they have set.

Principles

1. Targets for performance measures are a valuable part of planning, assessment and reporting.
2. Targets should be meaningful, achievable and challenging.
3. Targets should benefit students and help improve student learning.
4. Target setting should be an interactive process that takes a variety of qualitative and quantitative information into account. Charter school and provincial targets for measures provide a frame of reference for each charter school to use in setting school targets. Targets will vary from charter school to charter school, taking into consideration charter school

and community characteristics, past results and other information. Likewise, charter school targets reflect the charter school's context and results, as well as provincial results targets.

5. Targets should be communicated to parents and the public so that Albertans are part of the system-wide efforts to improve education for students.

Target Requirements for Required Measures

1. Targets need to be expressed quantitatively in relation to a whole (e.g., percentages, ratios).
2. Charter school targets need to be set in relation to charter school and provincial results and provincial targets for the Accountability Pillar measures.
3. Charter school targets are required for required measures for which there is historical data. Specifically: one-year targets when there are two years of data, two-year targets when there are three years of data, and three-year targets when there are four or more years of data.
4. Targets need to focus on improvement to attain a high level of performance.

Guidelines for Setting Targets

1. Consider a wide variety of information in setting targets: past performance, including trends over time on the measure under consideration as well as related measures (e.g., using prior years' Grade 3 achievement test results to set Grade 6 achievement test results), student or charter school characteristics, resources, both financial and human, that can be applied to achieve improvement, etc.
2. Target setting should be consistent with data collection methods. Data reliability and variability should be considered in target setting.
3. Involve stakeholders in setting targets at each level. School councils and staff should have input in setting school-level targets.
4. When setting targets, prioritize to focus on areas needing improvement, and ensure organizational capacity and resources are in place, including budget, staff and concrete actions of benefit to student learning that will be taken to improve results and achieve the targets.

5. Set targets in relation to other targets, (i.e., measures that impact each other). For example, performance on achievement tests in Grade 3 has implications for performance in Grade 6 three years later.
6. Visual displays, such as trend-line graphs and projections, aid in illustrating results and in setting targets. Trend lines based on at least five years of historical data or rolling three-year averages smooth out year-to-year variability (particularly evident in smaller charter schools), shift the focus from smaller, year-to-year changes to providing information about the longer term direction of the data, including estimates of future results.
7. Professional judgment that takes the local context into account, as well as local and provincial results, is needed for setting targets. In other words, trend data, graphs and projections are an aid to target setting – they do not in themselves determine the targets.

Development of the Accountability Pillar

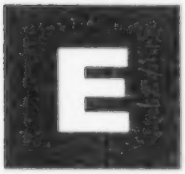
Drawing on the work of the Funding Framework Review Committee and the Review Committee on Outcomes, the Accountability Pillar Design and Implementation Advisory Sub-Committee (the sub-committee) worked with Alberta Education to develop the Accountability Pillar, including identifying the common set of performance measures. The following organizations were represented on the sub-committee: Alberta School Boards Association (ASBA), College of Alberta School Superintendents (CASS), Association of School Business Officials of Alberta (ASBOA), The Alberta Teachers' Association (ATA), Alberta Home & School Councils' Association (AHSCA), Fédération des conseils scolaires francophones de l'Alberta (FCSFA).

The sub-committee's guiding principles for the Accountability Pillar:

- transparent process
- emphasis on achievement
- holistic approach to evaluation
- on-going collaborative processes
- all jurisdictions can succeed.

The Accountability Pillar is aligned with Alberta Education's goals and outcomes for the K – 12 system and is integrated with the accountability framework in place since 1995. It focuses on:

- supporting continuous improvement
- improving student outcomes
- providing a clear understanding of jurisdiction performance and successes.



Glossary of Planning and Accountability Terms

Accountability: An obligation to answer for assigned responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results.

Continuous Improvement: Using performance results to adjust strategies and practices so that improvement in performance is achieved over time.

Goals: Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims.

Issues: An issue is a condition that may affect the organization's ability to fulfill its mandate or achieve its goals.

Mission Statement: A mission statement is a clear, concise description of a school jurisdiction's overall purpose and role. It gives direction to the programs and services that the jurisdiction provides for its students.

Outcomes: Outcomes are measurable statements of what school authorities and schools seek to achieve. In broad terms, they answer the question, "What will this look like when we get to where we want to be?"

Performance Measures: Performance measures provide information on important, quantifiable aspects of the education system. They enable school authorities to assess progress toward achieving goals and outcomes.

Principles and Beliefs: Principles and beliefs guide decision-making and provide a foundation for developing mission, vision and goals.

Profile: A profile is a brief description of the school authority or school that gives context for the plan. Profiles include such information as characteristics of communities, students, programs, size and location.

Strategies: Strategies are actions that school authorities and schools take to achieve goals and desired outcomes that meet the needs of all

their students. They address local circumstances, issues, trends and opportunities.

Targets: Targets show desired levels of performance to be attained by a certain time. Targets are expressed quantitatively.

Trend: A trend shows a direction of data over time, e.g., enrolment growth.

Vision: A vision describes a possible and desired future state for the organization, grounded in reality, which inspires and guides decisions and actions.

Terms Related to the Accountability Pillar Evaluation

(in logical, rather than alphabetical order)

Accountability Pillar: The Accountability Pillar is one of the three pillars of the Renewed Funding Framework and enhances school jurisdiction and charter school accountability for results in return for greater flexibility in the allocation of resources. The Accountability Pillar places increased emphasis on the achievement of specific outcomes by evaluating and reporting results on a common set of measures, and where results are low or declining, taking action to improve student programs and results in subsequent years. The focus of the Accountability Pillar is on improving results and attaining high levels of achievement.

Accountability Pillar Performance Measures: The Accountability Pillar performance measures are a required, consistent set of measures, each of which is calculated on a comparable basis for all school authorities. School jurisdictions and charter schools are required to include this common set of performance measures and evaluations in their plans and report the results and updated evaluations for these measures in their Annual Education Results Reports. The measures draw from various kinds of data, including:

- Results of provincial testing programs,
- Student outcomes, such as dropout and high school completion rates, and
- Student, parent and teacher perceptions.

Category: Accountability Pillar measures are grouped into seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools,
- Student learning opportunities,
- Student learning achievement (Grades K to 9),
- Student learning achievement (Grades 10 to 12),
- Preparation for lifelong learning, employment and citizenship,
- Parental involvement, and
- Continuous improvement.

Evaluation Methodology: The evaluation methodology assesses each measure in the Accountability Pillar in terms of achievement and improvement, then combines the achievement and improvement evaluations to calculate overall evaluations for measures and categories.

Achievement Evaluation: The Achievement evaluation is based on comparing the current jurisdiction or charter school result against a set of provincial standards that are expected to be fixed for 7 – 10 years. The achievement evaluation results in one of the following five achievement levels: Very High, High, Intermediate, Low, Very Low.

Standard: A standard is an established, quantifiable level of performance that is commonly understood and agreed upon, and is the basis for judging actual performance. The standards for each Accountability Pillar measure are calculated from baseline data (based on the distribution of results for all school jurisdictions at a fixed point in time). The 5^{th}, 25^{th}, 75^{th} and 95^{th} percentiles of the distribution of the baseline results are used to establish the five achievement evaluation levels (listed above under "Achievement Evaluation").

Baseline: Baseline data constitute a starting point for comparisons of results against standards. Baseline data for each Accountability Pillar measure are established by averaging each jurisdiction's results across the three years to create a three-year average for the jurisdiction. The three years that form the baseline for calculating standards differ among measure types, depending on data availability:

- For student achievement measures (i.e., Provincial Achievement tests and Diploma Exams), the baseline three-year average uses data from school years 2001/02, 2002/03, and 2003/04.

- For the student outcome measures (dropout, diploma exam participation, high school completion, post-secondary transition and Rutherford Scholarship eligibility rates), the baseline three-year average uses data from the 2000/01, 2001/02 and 2002/03 school years.
- For survey measures, the baseline three-year average uses results from 2003/04, 2004/05 and 2005/06.

Improvement Evaluation: The improvement evaluation focuses on improvement over time. Improvement is evaluated by comparing the jurisdiction's or charter school's current result against the jurisdiction's or charter school's previous three-year average using chi-square. (Chi square is a statistical test to determine the probability that there is no significant difference between an observed outcome and the expected outcome. In the case of the Accountability Pillar improvement evaluation, the chi square test is used to determine the probability that there is no significant difference between a jurisdiction's or charter school's current result on a measure and its prior three-year average for that measure.) The improvement evaluation results in one of the following five improvement levels: Improved Significantly, Improved, Maintained, Declined, Declined Significantly.

Overall Measure Evaluation: Once the improvement and achievement levels have been calculated for a measure, an overall measure evaluation is calculated, which reflects both the achievement evaluation and the improvement evaluation. The overall measure evaluation is reported on a five point scale: Excellent, Good, Acceptable, Issue, Concern.

Category Evaluation: For each category of Accountability Pillar measures, the overall evaluations for each measure within that group are averaged to provide an evaluation for that category. The averaging is done by assigning the following numbers to the overall evaluation for each measure: Excellent: 2; Good: 1; Acceptable: 0; Issue: -1, and Concern: -2. These values are averaged and rounded to the nearest whole number. This result is then compared with the above list of assigned numerical values for each of the five evaluation ratings to determine the evaluation for the category.

Improvement/Decline: Improvement or decline for an Accountability Pillar measure is determined by comparing the current result against the previous three-year average using the chi-square test of statistical significance. Using the chi-square test:

- an **improvement or decline** occurs when the current result is at least one standard deviation above or below the previous three-year average, but less than two standard deviations.
- a **significant improvement or decline** (at the 5% level of confidence, or nineteen times out of twenty) occurs when the current result is approximately two or more standard deviations above or below the previous three-year average.

Target: Targets related to achievement standards are set for each year of the plan when the evaluation of results for a measure is "Issue" or "Concern". These targets for Accountability Pillar measures:

- have a higher numerical value each year than current result (except for dropout rates, where a lower result shows improvement)
- show reasonable progress toward or move into the next higher achievement standard over the three years.
- Making gains over time toward the next achievement level or attaining it will be reflected in the improvement evaluation as well. At minimum the improvement evaluation would be "Maintained," and could be "Improved" or "Improved Significantly."

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